

STRATEGIC PLANNING CHECKLIST



Planning Process

- ☐ General description of process implementation included in plan process documentation
- ☐ Consultant used
- ☐ If so, identify: Phyllis H. Subin, Esq., LLC
- ☐ Department/agency explanation of how duplication of program operations will be avoided included in plan process documentation
- ☐ Incorporated statewide strategic initiatives
- ☐ Incorporated organization internal workforce plans and information technology plans

Analysis Tools Used

- ☐ SWOT analysis
- ☐ Cost/benefit analysis
- ☐ Financial audit(s)
- ☐ Performance audit(s)
- ☐ Program evaluation(s)
- ☐ Benchmarking for best management practices
- ☐ Benchmarking for best measurement practices
- ☐ Stakeholder or customer surveys
- ☐ Undersecretary management report (Act 160 Report) used
- ☐ Other analysis or evaluation tools used
- ☐ If so, identify: _____

Attach analysis projects, reports, studies, evaluations, and other analysis tools.

Stakeholders (Customers, Compliers, Expectation Groups, Others) identified

- ☐ Involved in planning process
- ☐ Discussion of stakeholders included in plan process documentation

Authorization for goals

- ☐ Authorization exists
- ☐ Authorization needed
- ☐ Authorization included in plan process documentation

External Operating Environment

- ☐ Factors identified and assessed
- ☐ Description of how external factors may affect plan included in plan process documentation

Formulation of Objectives

- ☐ Variables (target group; program & policy variables; and external variables) assessed
- ☐ Objectives are SMART

Building Strategies

- ☐ Organizational capacity analyzed
- ☐ Needed organizational structural or procedural changes identified
- ☐ Resource needs identified
- ☐ Strategies developed to implement needed changes or address resource needs
- ☐ Action plans developed; timelines confirmed; and responsibilities assigned

Building in Accountability

- ☐ Balanced sets of performance indicators developed for each objective
- ☐ Indicator Documentation Sheets completed
- ☐ Internal accountability process or system implemented to measure progress

Fiscal Impact of Plan

- ☐ Impact on operating budget
- ☐ Impact on capital outlay budget
- ☐ Means of finance identified for budget change
- ☐ Return on investment determined to be favorable